

Clairvaux Society

Of St. Bernard

Inspiring the benefactors of St. Bernard to preserve the past, honor the present, and secure the future.

Bequest Intention

A bequest in your will or Trust is a simple, thoughtful, and generous way through which you can support St. Bernard Preparatory School and St. Bernard Abbey. To include St. Bernard as a beneficiary in your estate plans, please complete and return this bequest intention form. This is not a legal document. It is a way to track future bequests to St. Bernard.

<p>I. Bequest Vehicle</p> <p>I have named St. Bernard as a beneficiary in my:</p> <p><input type="checkbox"/> Will (Please complete section II <input type="checkbox"/> Trust (revocable <input type="checkbox"/>; irrevocable <input type="checkbox"/> <input type="checkbox"/> IRA \$ _____ <input type="checkbox"/> Retirement Plan (Type: _____) \$ _____ <input type="checkbox"/> Insurance Policy \$ _____ Company _____ Policy# _____</p> <p>We would appreciate attaching any additional information (i.e., the page in which St. Bernard is mentioned in your estate plans).</p>	<p>II. Bequest Form</p> <p>I will provide for the St. Bernard in the following manner:</p> <p><input type="checkbox"/> A percentage of my estate (_____ %) <input type="checkbox"/> A specific dollar amount \$ _____ <input type="checkbox"/> The residue of my estate after other bequests <input type="checkbox"/> A specific item of value (Please list item here): _____</p> <p>The intended "approximate amount" of my bequest is: \$ _____ We understand that this is "only and estimate".</p>
<p>III. Bequest Designation</p> <p>I wish for my bequest to benefit St. Bernard in the following manner:</p> <p><input type="checkbox"/> Applied at the discretion of St. Bernard to its greatest needs.</p> <p><input type="checkbox"/> For the following purpose _____</p>	<p>IV. Bequest Recognition</p> <p><input type="checkbox"/> I wish to be listed in the St. Bernard annual report as a member of the Clairvaux Society, St. Bernard's planned giving recognition society.</p> <p><input type="checkbox"/> I wish to make my bequest confirmation anonymously</p>

V. Personal Information

Name: _____ Spouse (If applicable): _____
Address: _____ City: _____ State: _____ Zip: _____
Home Phone: _____ Cell Phone: _____ Email: _____
Signature: _____ Date: _____

Please return to: Development Office, St. Bernard Planned Giving, 1600 St. Bernard Dr. SE, Cullman, AL 35055

www.stbernardabbey.com 256-739-6682